# Specific Training

# Section O:
# Senior Leader Rating Officials & My Forms

**Purpose**: To provide administrative and Human Resources personnel options as they assist senior leader rating officials with the My Forms military evaluation counseling, preparation, and submission process keeping this process easy, quick, and effective without circumventing regulatory intent or requirements.

# Areas for Consideration w/ Senior Leader Rating Officials

**Key Point #1:** Using My Forms (e.g., the AKO portal functions and evaluation forms wizards) as originally designed and intended provides all rating officials with the most benefits and least risk or errors in the least amount of steps and prepares users for a fully electronic environment (DIMHRS).

**Key Point #2:** Rating officials are able to focus on content of the assessment and review of the entire report. When rated officers and NCO raters have a My Forms support/counseling form at the beginning of a rating period, administrative work to produce a final evaluation is practically nil.

**Key Point #3:** There are several key areas within the overall evaluation process in My Forms which, if implemented as options, accommodate a senior leader rating official's normally intense work environment without compromising evaluation system intent.

# Areas for Consideration with Senior Leader Rating Officials

The slide presentation will address the following My Forms Options (MFO) available to senior leader rating officials:

1. Functions & topics for discussion and training prior to implementation.
2. Creating a final evaluation from a counseling/support form.
3. Understanding available options to move evaluations between individuals.
4. Using controlled access, shared folders to prepare evaluations.
5. Preparing documents with senior leader rating official content.
6. Letting two people sign from one computer.
7. Submitting completed evaluations to HQDA.

Slides sorted by number:

MFO #

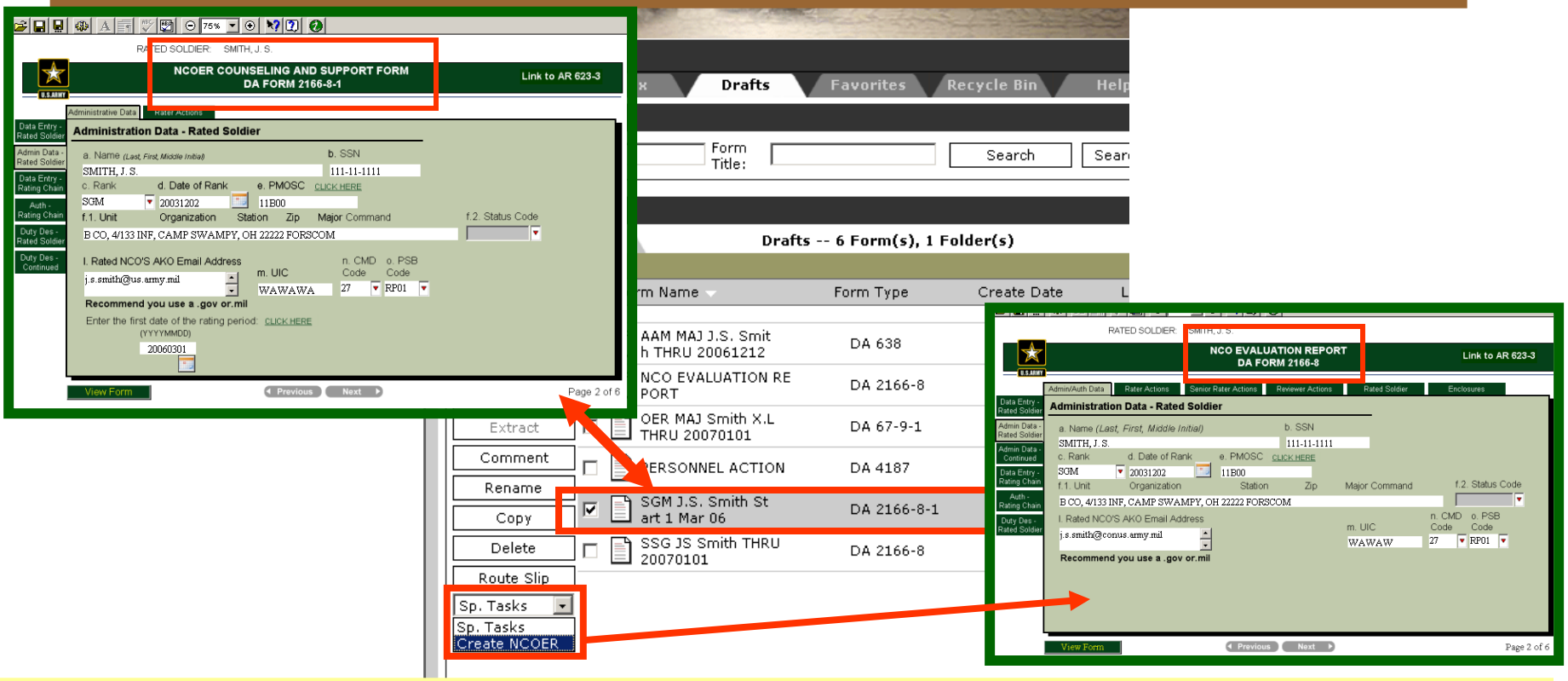
# Functions & topics for discussion and training prior to implementation.

MFO #1

As a minimum, key personnel should discuss and train on the functions and topics listed below. Each individual should know how to:

- ❑ Sign forms
- ❑ Use tabs in evaluation form wizards to review and add content for any of the rating officials or as a rated Soldier.
- ❑ Move between the wizard view to form view (and back) prior to signing an evaluation.
- ❑ SAVE information (when in My Forms) and SAVE AS information (when taking the form out of My Forms).
- ❑ Review support forms that accompany a final evaluations. (Note: currently, there is not an easy way to link these forms electronically but there will be in the future when My Forms folders are placed back in operation.)
- ❑ Route a form in My Forms (the original or an information copy) and why you don't want to use routing to send a form by email.
- ❑ View a report in My Forms tracking system.

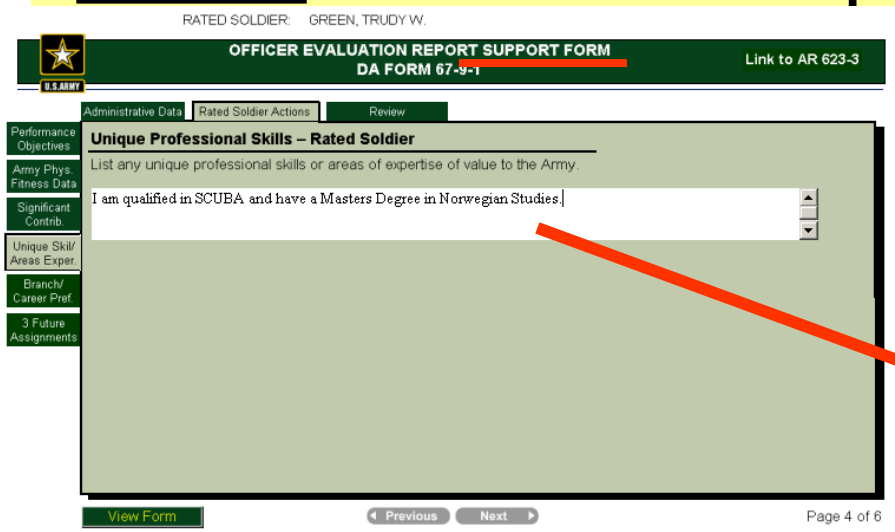
# MFO #2 Creating a final evaluation from a counseling/support form.

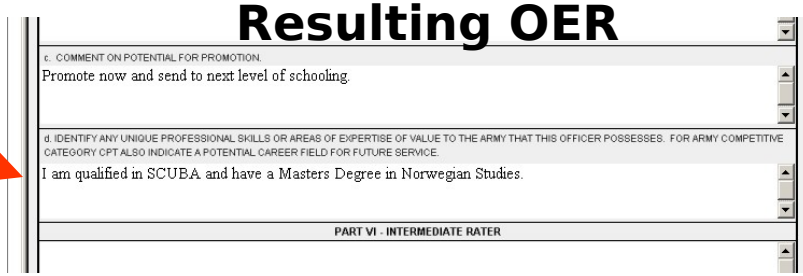



Example: A rater can take a counseling & support form which was used throughout an evaluation period and at the end of that rating period create a base draft of a final evaluation using My Forms. The created NCOER will be a separate document and include all pertinent information originally typed and contained in the counseling & support form. This concept works for OER also.

# Example: Creating an OER from an OER support form.

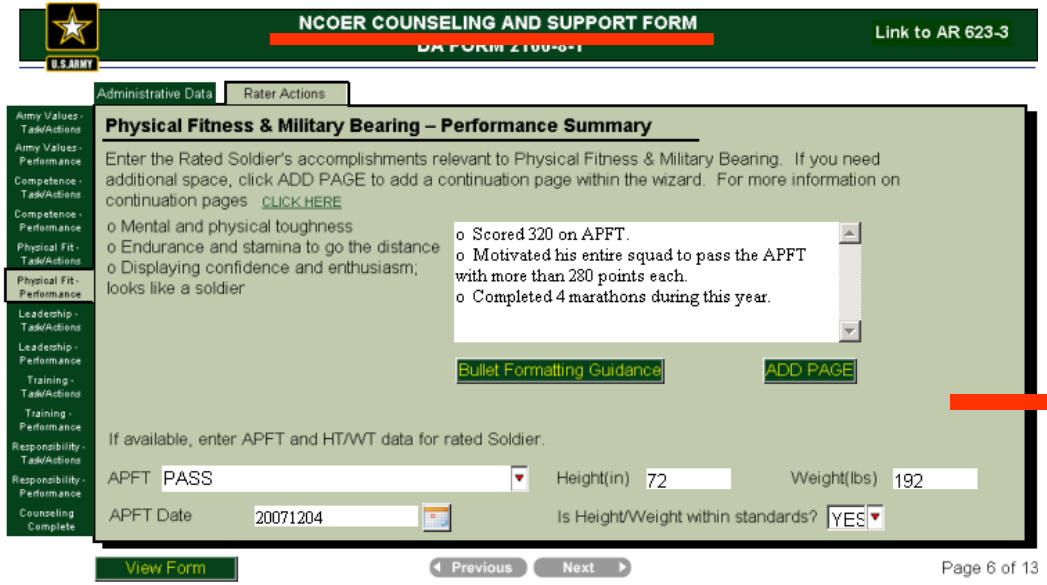
MFO #2


RATED SOLDIER: GREEN, TRUDY W.
OFFICER EVALUATION REPORT SUPPORT FORM
DA FORM 67-9-1
Link to AR 623-3
Administrative Data
Rated Soldier Actions
Review
Performance Objectives
Army Phys. Fitness Data
Significant Contrib.
Unique Skil/ Areas Exper.
Branch/ Career Pref.
3 Future Assignments
Unique Professional Skills – Rated Soldier
List any unique professional skills or areas of expertise of value to the Army.
I am qualified in SCUBA and have a Masters Degree in Norwegian Studies.
View Form
Previous
Next
Page 4 of 6

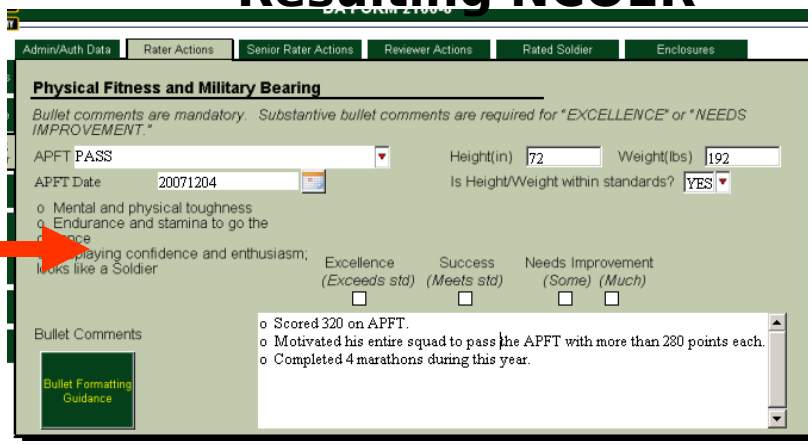

Resulting OER
c. COMMENT ON POTENTIAL FOR PROMOTION.
Promote now and send to next level of schooling.
d. IDENTIFY ANY UNIQUE PROFESSIONAL SKILLS OR AREAS OF EXPERTISE OF VALUE TO THE ARMY THAT THIS OFFICER POSSESSES. FOR ARMY COMPETITIVE CATEGORY CPT ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.
I am qualified in SCUBA and have a Masters Degree in Norwegian Studies.
PART VI - INTERMEDIATE RATER

The information from an OER support form transfers to a final assessment in the same manner it does on an NCOER. The example here shows that a rated officer may enter unique skills onto the support form and it transfers to appropriate sections on the OER. The rating official responsible the final evaluation retain the option to accept and change any thing prior to completing and signing their input.

# MFO #2 Example: Creating an NCOER from an NCOER counseling/support form.


NCOER COUNSELING AND SUPPORT FORM
Link to AR 623-3
Administrative Data
Rater Actions
Physical Fitness & Military Bearing – Performance Summary
Enter the Rated Soldier's accomplishments relevant to Physical Fitness & Military Bearing. If you need additional space, click ADD PAGE to add a continuation page within the wizard. For more information on continuation pages CLICK HERE
o Mental and physical toughness
o Endurance and stamina to go the distance
o Displaying confidence and enthusiasm; looks like a soldier
o Scored 320 on APFT.
o Motivated his entire squad to pass the APFT with more than 280 points each.
o Completed 4 marathons during this year.
Bullet Formatting Guidance
ADD PAGE
If available, enter APFT and HT/WT data for rated Soldier.
APFT PASS
Height(in) 72
Weight(lbs) 192
APFT Date 20071204
Is Height/Weight within standards? YES
View Form
Previous
Next
Page 6 of 13

## Resulting NCOER

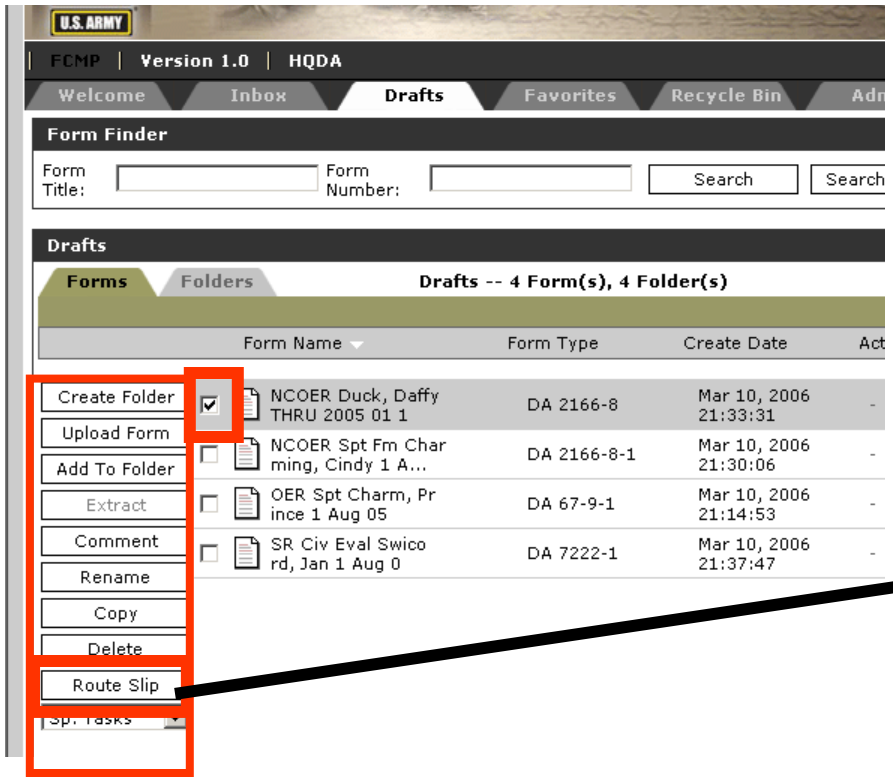

Admin/Auth Data
Rater Actions
Senior Rater Actions
Reviewer Actions
Rated Soldier
Enclosures
Physical Fitness and Military Bearing
Bullet comments are mandatory. Substantive bullet comments are required for "EXCELLENCE" or "NEEDS IMPROVEMENT."
APFT PASS
Height(in) 72
Weight(lbs) 192
APFT Date 20071204
Is Height/Weight within standards? YES
o Mental and physical toughness
o Endurance and stamina to go the
looks like a Soldier
Excellence (Exceeds std)
Success (Meets std)
Needs Improvement (Some) (Much)
Bullet Comments
Bullet Formatting Guidance
o Scored 320 on APFT.
o Motivated his entire squad to pass the APFT with more than 280 points each.
o Completed 4 marathons during this year.

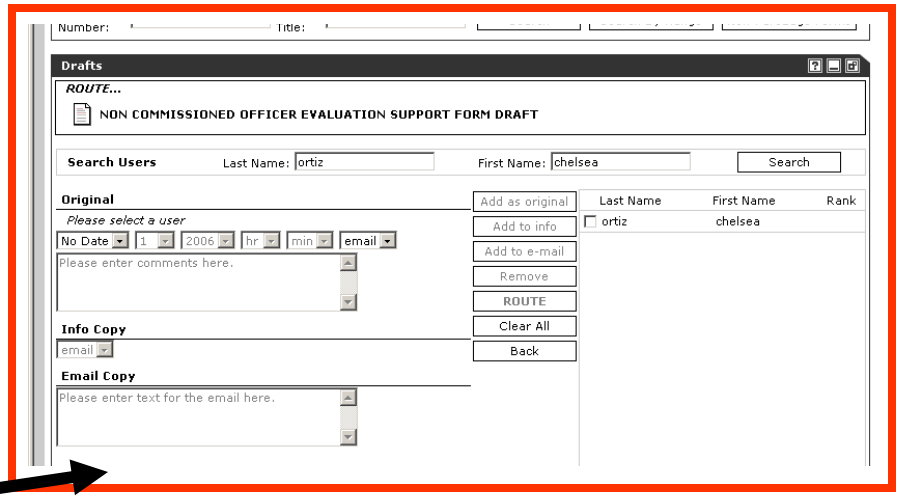
The rater documents APFT information on the counseling & support form. It transfers to an NCOER. The rater enters text (initial bullets) onto the counseling & support form which transfers to a NCOER. The rater then reviews the info and text and puts it into bullet format. Information contained on additional pages to the counseling & support form will not transfer but can be reviewed and incorporated, as appropriate.

# MFO #3 Understanding available options to move evaluations between individuals.

**#1**

Routing an evaluation form in My Forms is the most reliable and provides the most accurate and up-to-date information with fewest processing steps. Additional training on this function is available.




POC: ESO, tapcmse@conus.army.mil, (703) 325-9660 (DSN: 221) https://www.hrc.army.mil/site/Active/TAGD/ESPD(formerly_MSD)/msdweb.h
As of: 4 Apr 08

# MFO #3 Understanding available options to move evaluations between individuals.

**#2**

Rating officials can send evaluation forms to each other as attachments to standard emails; however, there are some items requiring consideration if this is the chosen method.

- Any information, content, or signature added or changed on the form while in its attachment mode will not save automatically. Even if the form is closed and the email saved the form will not retain the changes.
- After making any change to the form in an attachment mode the user must SAVE AS to a computer location (not the email).
  - This action saves changes to the form.
  - The user can also alter the document name to reduce confusion later.
- When the updated form needs to be forwarded to another person the email should be updated with the revised evaluation.
- Very specific steps for this process are listed out on the next slide

# MFO #3 Understanding available options to move evaluations between individuals.

**#2 cont.**

Steps for saving information in a form sent as an email attachment

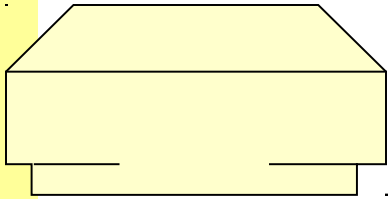
1. Open form as an attachment.
2. Review form (adding or deleting as needed) using NEXT & PREVIOUS buttons at bottom of page or by rater role TABS at top and left side of page.
3. Select VIEW FORM (lower left corner).
4. Digitally sign form.
5. Select SAVE AS (top of form)
6. Browse to desired location to save the form outside of the email. Change name if desired.
7. Close form (upper right corner – select X).
8. Delete original attachment if desired.
9. Insert revised evaluation to email as an attachment.
10. Send email to next recipient.

# MFO #3 Understanding available options to move evaluations between individuals.

**#3**

- Rating officials can SAVE AS the evaluation out of My Forms and onto other locations and information storage devices such as laptops, disks, drives, or other OPSEC approved storage devices.

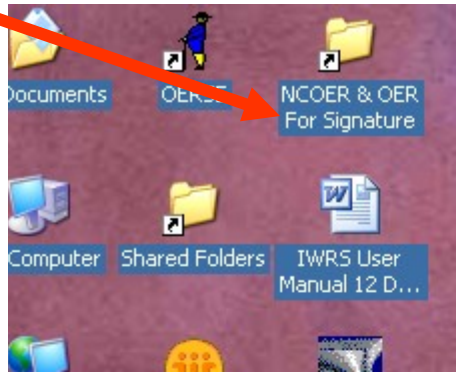
- Evaluation forms retain wizard question and digital signature capabilities outside of My Forms.



- Once saved outside of My Forms users are not able to auto fill/ pull administrative information on rated Soldiers from authoritative databases or create final evaluations from support forms. These functions are only executable within My Forms.

# Using controlled access, shared folders MFO #4 b prepare evaluations (Part 1).

- XO receives evaluation from rater in My Forms.
- XO reviews evaluation and places it in an electronic folder with senior leader access outside of My Forms.




  - SAVE AS puts form on desktop or personal shared drive.
  - The document routed to an XO remains in XO's My Forms Inbox. It also remains in tracking, viewable by those who entered content or had an information copy.
  - The electronic folder location must be one the senior leader knows to open and which is not accessible by others.
- XO informs senior leader that an evaluation is ready for appropriate action.
- Senior leader completes all actions required for the evaluation to include obtaining rated Soldier signature.
- XO uploads form back into My Forms and takes the next action (send to HRC or next rating official) as appropriate.

# Using controlled access, shared folders to prepare evaluations (Part 2).

MFO #4

When uploading a form into the portal the XO will be faced with one of three questions or responses:

- The form already exists in the repository. Do you want to overwrite?

(XO will get this with optimal use of My Forms.)

- The form already exists in the repository. Do you want to make a copy?

- You have uploaded your form successfully!

The originating form's location and method of delivery to XO determines which response will be encountered. Executing subsequent actions have differing impacts to the form copies pre-existing in My Forms in in boxes or in tracking. We recommend testing and practice with sample forms on the entire process, and particularly the upload function, to make sure your process works for

MFO #5

# Preparing documents with senior leader rating official content (Part 1).

- Senior leader rating officials may direct that other rating officials send evaluations requiring their input and action to a designated individual and not directly to the senior leader.
- Designated individuals are often XO, administrative assistants, or secretaries.
- Designated individuals receive, review for administrative correctness, discuss appropriate rating official input with senior leaders, and add or change content as appropriate.
- Anyone who has control of the original document in My Forms may add content to an evaluation in any section.
    - However, a rating official signature will only “freeze” the evaluation content that is associated with that particular rating official.
    - Designated individuals may answer evaluation wizard questions for a senior leader rating official; however, as a minimum senior leader rating officials must review and sign and accept the content as their own.
- Once ready, designated individuals place the evaluation in a

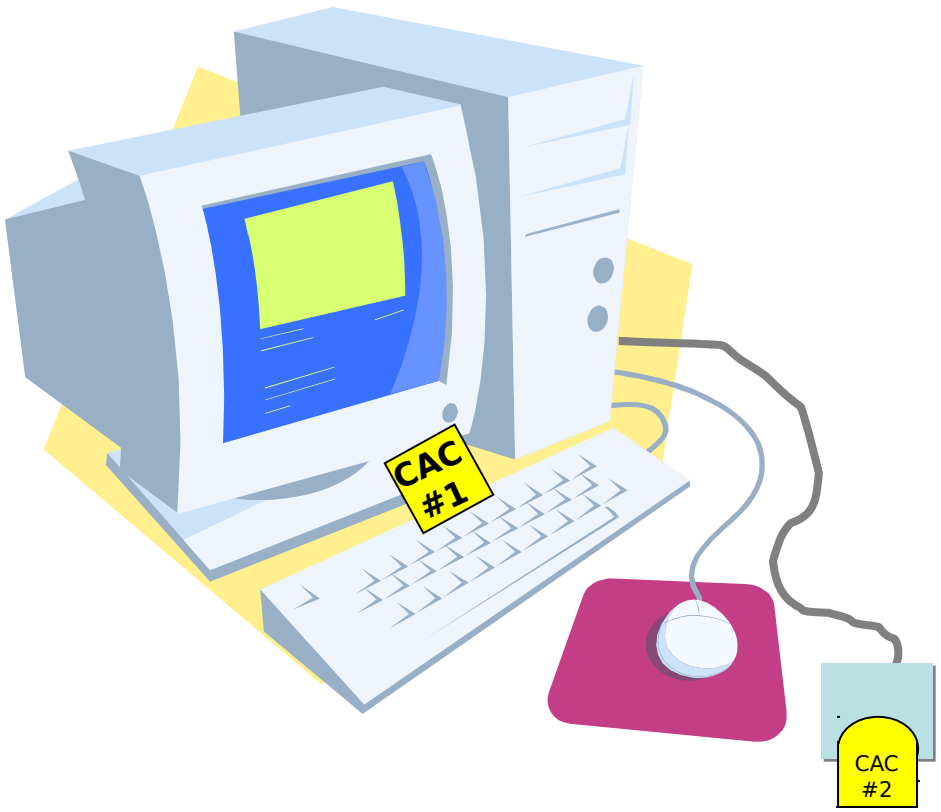
MFO #5

# Preparing documents with senior leader rating official content (Part 2).

- For senior leader who are senior raters:
  - designated individuals may contact rated Soldiers and arrange counseling appointments on the senior leader's calendar.
  - based on senior leader input the rated Soldiers may receive a copy of the completed evaluation for review prior to or during this counseling appointment.
  - After counseling appointments, designated individuals can assist rated Soldiers with signing the final evaluation.

MFO #6

# Letting 2 people sign from 1 computer.

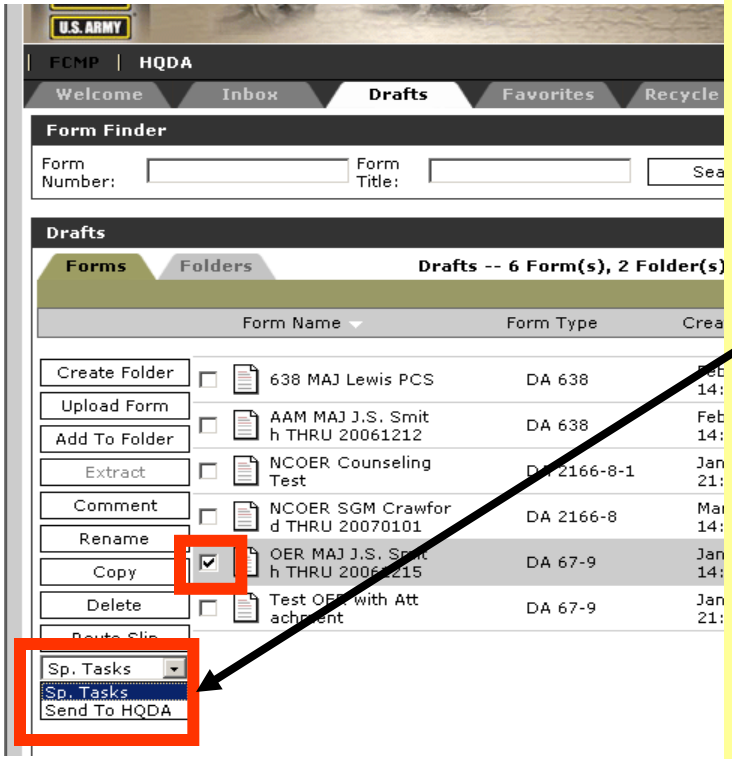



Anyone can put a second CAC reader on a machine (in an available port) and use that CAC reader to allow a second person to sign a document while the primary computer user remains signed on with his/her CAC.

<u>In application</u>: Once a senior leader rating official completes a counseling session the rated Soldier leaves the office and stops at the admin assistant's or XO's desk and signs the counseling form or evaluation.

MFO #7

# Submitting completed evaluations to HQDA.




- Any senior rater can designate an individual to submit evaluations to HQDA for them.
- Once an evaluation has all the required signatures it can be sent to HQDA for final processing into the Soldier's Official Military Personnel File using the "Send to HQDA" function in My Forms.
- Once sent anyone who holds the evaluation in their tracking section can confirm that the report has been submitted to HQDA (seen as HQDA APP as owner). HQDA normally takes between 24-48 hours to review and accept the document or return for correction with explanation to the sender.